

AGRI^{IN} DATA

JULY 2021

AGRI IN DATA is a Government of Goiás publication, provided by the Secretariat of Agriculture, Livestock and Supply of Goiás State (Seapa). The data collection and editing are under the responsibility of the Market Intelligence Management of the Superintendence of Sustainable and Rural Production, while the Communication Department is in charge of the graphic design, diagramming and reviewing. The photos in this edition are by the Brazilian Confederation of Agriculture and Livestock (CNA) and Brazilian Agricultural Research Corporation (Embrapa).

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Agro Goiás

Who travels around the State of Goiás must have found sunflower plantations in the period between May and July, when the oleaginous crop is harvested in the state. A flowering field is one of the most beautiful scenes you can experience. In addition to being an opportunity to take pictures, the crop is important to the Goiás economy. According to estimates of the National Supply Company (Conab), Goiás should lead the national ranking of sunflower production in the country, 42.0 thousand tons in the 2020/21 season, an increase of 27.7% compared to the previous crop.

The adoption of sunflowers to be planted in the second crop by the farmers has increased and, with that, they started to invest in the supply chain as an alternative to soybean succession. The crop has technical and economic feasibility, due to the good water resistance, lower disease and pest pressure and high temperature support. The grain is used both for biodiesel blend and oil production and processing by the food industry, in addition to animal diets such as meal and silage.

Normally, sunflowers must be planted by March 15th and harvested by June 30th, these guidelines are established by the Agency for the Agriculture and Livestock Defense in Goiás (Agrodefesa), under the Normative Instruction No. 08/2017. However, the harvest period this year was postponed until July 25th. The measure attends entities from the sector, which have requested Agrodefesa to extend the harvest period of the oilseed. This is because, in the last two years, due to the high rainfall levels in February, soybeans had to be harvested later in the state, resulting in delays in sunflower planting. These important numbers of the crop and the work made by Agrodefesa, under the jurisdiction of Seapa, stand out in the Agri in Data July's publication.

In addition, the Bulletin provides information on livestock – cattle, swine, poultry and dairy products – and crop production – soybean and corn. It is the opportunity to have accessible data that proves the importance of agriculture for the economic development of the state of Goiás.

Enjoy your reading!



TIAGO MENDONÇA
STATE SECRETARY
OF AGRICULTURE,
LIVESTOCK AND
SUPPLY IN GOIÁS

#ÉPorVocêQueAGenteFaz #OAgroédeTodos #SomosTodosGoiás

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INTRODUCTION

Agriculture is the most important sector in the Brazilian economy and contributes positively to the country's trade balance surplus, with a share of almost 47.0% of the value exported in the first five months of 2021. The record crop and favorable exchange rate increased international negotiations and leveraged Brazilian shipments. According to data from the Ministry of Agriculture - MAPA, from January to May 2021, Brazil had revenues of US\$ 50.2 billion in foreign sales of agricultural products - up 21.9%, compared to the same period of the previous year. The state of Goiás accounted for over US\$3.0 billion of this total and grew 14.8%. Exports of agricultural products from Goiás, January to May 2021, reached 77.3% of the total value traded by the state.

The 2020/21 national grain crop is estimated at 262.1 million tons, according to the 9th CONAB Survey. Goiás should share 9.4% of the total produced in the country, with emphasis on the soybean and corn production, which together account for 91.9% of the total grain production in the state. For the second crop, water stress has impacted the development of crops and reduced

yield. CONAB projected 7.4 million tons for *safrinha* corn in Goiás, 3.0 million tons less than in the previous season. For crops more adapted to the lower water availability in Goiás, the Company's data are optimistic and projects yield increases of 6.5% for sorghum and 25.0% for sunflower, which keeps the state as a major producer in the country.

The commodities scenario in Brazilian production and the favorable price are reflected on the estimates of the Gross Value of Agricultural Production (VBP). In the country, the Ministry of Agriculture data for the 2021 VBP is R\$1.1 trillion - growth of 11.8%, compared to last year. Goiás accounts for 8.6% of this value, and holds the position as the 6th largest VBP in the country (R\$ 95.8 billion), growth of 15.1% compared to the 2020. The VBP estimate for Goiás agriculture is R\$65.9 billion, 18.3% over last year's result. For livestock, it is estimated at R\$ 29.9 billion, an increase of 8.6% compared to 2020.

The rural credit is an important tool to ensure the improvement of rural activities and, through the Safra Plan, encourages technological modernization and best practices, with a focus on sustainable development and strengthening family

farming. In Goiás, in the 2020/21 crop, more than 62 thousand contracts were signed, amounting to R\$24.6 billion, 41.0% more than 2019/20 Safra Plan. For the next season, the forecast is that rural producers in Goiás will continue their investments and strengthen the sustainability of production in the state.

The increase in agriculture's investment reflects more employment in the countryside and also in the city. In the first five months of this year, 7,677 new jobs were created in the agricultural sector in Goiás. As for post-farm gate activities, the highlight of agribusiness is the food industry; 2,412 new jobs were created in Goiás during this period. That shows the strength of agriculture and its contribution to the social and economic development of Goiás.





Although the amount of **cattle** slaughtered in the country has reduced, in Goiás it has increased and helped to supply the international market. In Brazil, 709.6 thousand tons of beef were exported from January to May 2021, US\$3.2 billion in foreign exchange - Goiás accounts for 13.7% of this value. Meat prices remain high, according to Cepea/B3 fed cattle index for the arroba¹ reached R\$321.90 at the end of June (06/28), and in Goiás, IFAG² recorded an average price of R\$299.40/arroba in the last week of the month. The high prices in the country comes mainly from a restricted number of animals for slaughter and strong international demand. In the scenario of high production costs and high external demand, it is important for the rancher to increase the investments in technology to boost yield.



The average price of live **pork** rose during the month of June, mainly due to the increase in international demand. The CEPEA/ESALQ Live Swine Index, on June 28 for São Paulo, closed at R\$7.23/kg and, on the same date for Goiás it was R\$7.50/kg, according to IFAG. On the international market, according to the Ministry of Economy, Brazilian shipments of this protein year-to-date (January to May) was 18.4% higher in volume, compared to the same period of the previous year. Despite the June peak of pork prices, the market dropped in July, due to sales decrease in the domestic market.





The international **poultry** trades continue strong both in Brazil and in Goiás. According to data from the Ministry of Economy, from January to May of this year, the country exported 1.8 million tons of this protein, US\$ 2.8 billion in revenue. By early June, negotiations in the domestic market intensified (CEPEA³) and, added to the low supply of the product, contributed to cause the prices to increase. In Goiás, live poultry was sold at R\$ 5.20/kg in the last week of June, according to the IFAG Market Bulletin. For the month of July, poultry prices are expected to continue high in the domestic market.



The off-season **milk** production, high production costs and food price spreads from farm to consumer was the scenario of this productive chain. The lack of water availability has been more intense this year, which affects the pasture's quality and increases dietary supplementation. This has impacted the supply of raw material and contributed to the appreciation of milk in the farm. According to the June Bulletin of Dairy Market in Goiás, the state's dairy industry had an increase in the average price, compared to the previous month, with a total weighted variation of 14.83% in the basket of dairy products. Thus, increases in costs and prices throughout the entire productive chain were observed. Also, reduced exports and an increase in imports of dairy products were registered. According to the Ministry of Economy, the amount of powdered milk exported by Brazil, in May, dropped 42.5% compared to the previous month, while purchases of this product from other countries increased by 26.1%.

¹ Arroba - a 15-kilo unit of weight that is a commonly used as a benchmark for cattle prices in Brazil

² IFAG - Institute for the Strengthening of Agriculture in Goiás

³ CEPEA - Center of Advanced Studies on Applied Economics

Source: CEPEA-ESALQ/CONAB/IFAG/MAPA/Ministry of Economy.



CATTLE/BEEF

Goiás: Cattle Slaughter

1st quarter of 2021

642.5 THOUSAND HEAD **↑ 4.1%***

169.0 THOUSAND TONS CARCAS **↑ 7.5%***

421.5 THOUSAND UNITS OF TANNED LEATHER **0.0%***

4th LARGEST PRODUCER**

8th LARGEST PRODUCER**

* Compared to the previous year

** Among the states and the Federal District

Goiás: Gross Value of Beef Production

Estimate 2021

R\$ 15.5 BILLION **↑ 13.4%***

4th HIGHEST GROSS VALUE OF PRODUCTION**



10.0% OF THE NATIONAL GROSS VALUE OF BEEF PRODUCTION



51.7% OF THE GROSS VALUE OF LIVESTOCK PRODUCTION IN GOIÁS

* Compared to the previous year

** Among the states and the Federal District

Goiás: Beef exports

Year-to-date (January to May)

US\$ 445.2 MILLION **↑ 8.5%***

3rd LARGEST EXPORTER**

96.2 THOUSAND TONS **↑ 3.4%***

May 2021

US\$ 106.4 MILLION **↓ 4.6%***

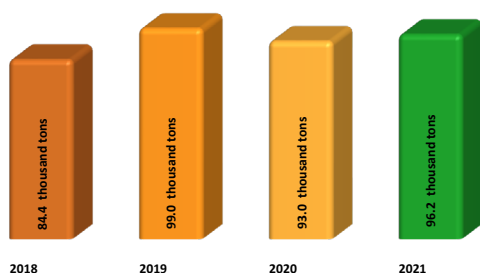
21.9 THOUSAND TONS **↓ 13.6%***

* Compared to the same period of the previous year

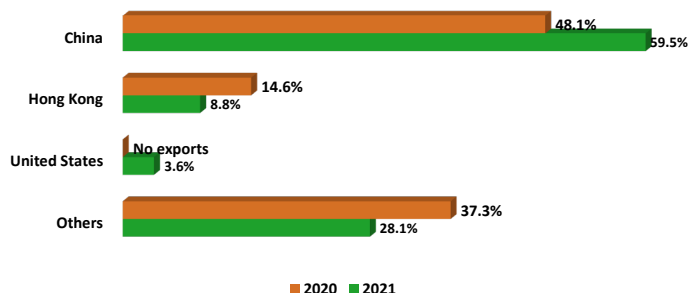
** Among the states and the Federal District

GOIÁS: BEEF EXPORTS - YEAR-TO-DATE (JANUARY TO MAY)

YEAR-TO-DATE



MAIN DESTINATIONS



Source: Conab / IFAG / MAP / Ministry of Economy

PORK/HOGS



Goiás: Hog Slaughter

1st quarter of 2021

484.2 THOUSAND HEAD **↓ 0.3%***

47.0 THOUSAND TONS CARCASS **↑ 3.1%***

8th LARGEST PRODUCER**

* Compared to the previous year

** Among the states and the Federal District

Goiás: Gross Value of Pork Production

Estimate 2021

R\$ 1.2 BILLION **↓ 4.8%***

8th HIGHEST GROSS VALUE OF PRODUCTION**



4.1% OF THE NATIONAL GROSS VALUE OF PORK PRODUCTION



4.1% OF THE GROSS VALUE OF LIVESTOCK PRODUCTION IN GOIÁS

* Compared to the previous year

** Among the states and the Federal District

Goiás: Pork Exports

Year-to-date (January to May)

US\$ 8.8 MILLION **↑ 59.0%***

7th LARGEST EXPORTER**

5.2 THOUSAND TONS **↑ 25.1%***

May 2021

US\$ 1.6 MILLION **↑ 32.3%***

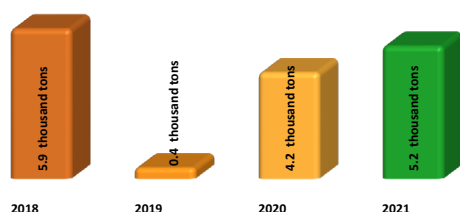
1.1 THOUSAND TONS **↑ 19.6%***

* Compared to the same period of the previous year

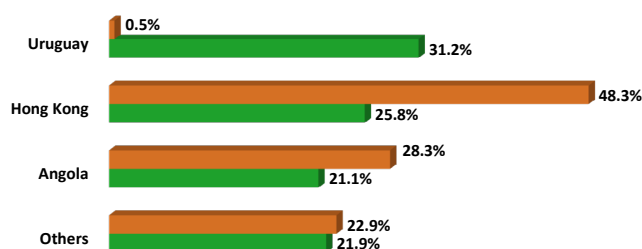
** Among the states and the Federal District

GOIÁS: PORK MEAT EXPORTS - YEAR-TO-DATE (JANUARY TO MAY)

YEAR-TO-DATE



MAIN DESTINATIONS



Source: Conab / IFAG / MAP / Ministry of Economy.

2020 2021



Goiás: Poultry Slaughter

1st quarter of 2021

115.6 MILLION HEAD **↑ 16.6%***

276.3 THOUSAND TONS **↑ 25.4%***

6th LARGEST PRODUCER**

* Compared to the previous year

** Among the states and the Federal District

Goiás: Gross Value of Poultry Production

Estimate 2021

R\$ 6.7 BILLION **↑ 9.6%***

6th HIGHEST GROSS VALUE OF PRODUCTION**



7.1% OF THE NATIONAL GROSS VALUE OF POULTRY PRODUCTION



22.5% OF THE GROSS VALUE OF LIVESTOCK PRODUCTION IN GOIÁS

* Compared to the previous year

** Among the states and the Federal District

Goiás: Poultry Meat Exports

Year-to-date (January to May)

US\$ 155.7 MILLION **↑ 7.8%***

4th LARGEST EXPORTER**

86.7 THOUSAND TONS **↑ 2.7%***

May 2021

US\$ 36.0 MILLION **↑ 13.7%***

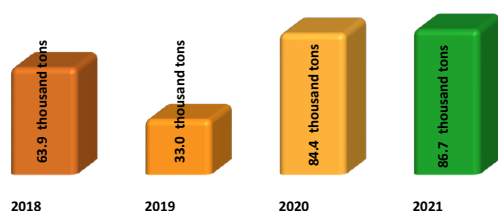
20.2 THOUSAND TONS **↓ 5.0%***

* Compared to the same period of the previous year

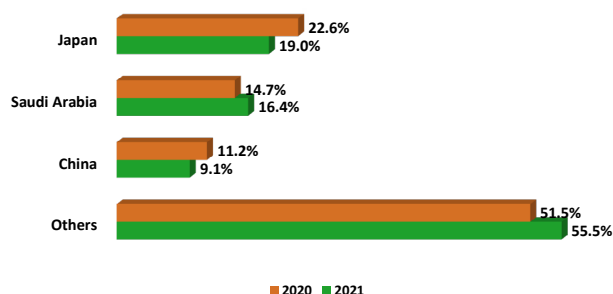
** Among the states and the Federal District

GOIÁS: POULTRY MEAT EXPORTS - YEAR-TO-DATE (JANUARY TO MAY)

YEAR-TO-DATE



MAIN DESTINATIONS



Source: Conab / IFAG / MAP / Ministry of Economy.

DAIRY



Goiás: Processed Fluid Milk

1st quarter of 2021

690.3 MILLION LITERS

↑ **4.3%***

5th LARGEST PRODUCER**

SHARE OF **10.5%** OF THE NATIONAL PRODUCTION

* Compared to the previous year

** Among the states and the Federal District

Goiás: Gross Value of Milk Production

Estimate 2021

R\$ 5.4 BILLION

↓ **1.2%***

6th HIGHEST GROSS VALUE OF PRODUCTION**



11.0% OF THE NATIONAL GROSS VALUE OF MILK PRODUCTION



18.1% OF THE GROSS VALUE OF LIVESTOCK PRODUCTION IN GOIÁS

* Compared to the previous year

** Among the states and the Federal District

Goiás: Dairy exports

Year-to-date (January to May)

US\$ 424.0 THOUSAND

↑ **6.1%***

8th LARGEST EXPORTER**

178.2 TONS ↓ **20.3%***

May 2021

US\$ 115.7 THOUSAND

↑ **32.3%***

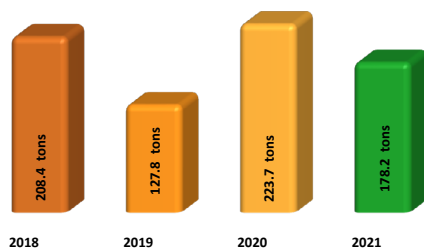
55.2 TONS ↑ **78.0%***

* Compared to the same period of the previous year

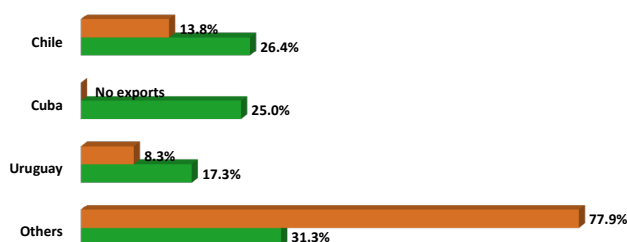
** Among the states and the Federal District

GOIÁS: DAIRY EXPORTS - YEAR-TO-DATE (JANUARY TO MAY)

YEAR-TO-DATE



MAIN DESTINATIONS



■ 2020 ■ 2021

Source: Conab / IFAG / MAP / Ministry of Economy.



In the 2020/21 season, Brazil set a new **soybean** production record, with an estimate of 135.9 million tons harvested, an increase of 8.8% compared to the previous crop, according to CONAB¹. Also according to the Company, the domestic demand is expected to reach 50.2 million tons in 2021. The oilseed price waved throughout June - impacted by the North American crop.

The price for the 60-kg bag on 06/30/21 closed at R\$158.12, according to the ESALQ/BM&FBovespa Index - negative average in the month of 8.6%. In Goiás, on the same date, according to IFAG², the average price of the available soybean was R\$ 141.44. The downward price pressure was mainly driven by the soybean derivatives values (CEPEA/ESALQ). In the foreign market, although the Brazilian soybean complex exports slowed down in May, year-to-date (January to May), the volume shipped grew 3.8%, compared to the same period in 2020, and totaled 55.4 million tons (Ministry of Economy).



The **safrinha corn** in the major producing regions is projected to decline in production and yield, mainly as a result of weather conditions. In early July, only 14.9% of estimated production in the country had been harvested (CONAB). In the state of Goiás, the estimate for safrinha corn production dropped 28.2% compared to the last crop. Regarding prices, the ESALQ/BM&FBovespa index decreased in June, the monthly average was R\$ 92.09/bag of 60 kg, 8.6% lower than in May.

The corn prices in Goiás also retracted, according to the IFAG's fourth week bulletin, the average price closed at R\$ 68.10/bag. In the international market, both Brazilian

corn imports and exports increased in the year-to-date (January to May) - up 78.4% and 21.5%, respectively. Despite the price drop in June, the sales levels are expected to be high and appreciated, mainly due to the negative impacts of the weather on the safrinha corn crop.



The **sunflower** cultivation in the Cerrado has stood out for its technical and economic factors in the production chain. In addition to good water resistance, lower disease and pest pressure and high temperature support, the plant has a high nutrient cycling that contributes to the crop sustainability. In Goiás, it is an excellent alternative as a second crop, mainly after soybean crop harvest. Sunflower is used by the food industry (oil production and grain processing), for animal diets (meal, silage and grain) and also in the biodiesel blend. Another highlight is the ornamental sunflower, which is expressive in the floriculture. For the 2020/21 crop in the country, there was a decrease in the planted area and, according to CONAB, the production is estimated at 59.9 thousand tons in 31.5 thousand hectares. Goiás projections are different from the national ones, since an increase in the acreage and volume are expected and, with these results, the state reaches the leadership in the ranking of sunflower production in this season. Regarding the average price in the state, according to IFAG, the 60 kg bag was sold on 06/30/2021 at R\$135.00.

¹ CONAB – National Food Supply Company

² IFAG - Institute for the Strengthening of Agriculture in Goiás

Source: CEPEA-ESALQ/CONAB/IFAG/MAPA/
Ministry of Economy.

SOYBEAN



Goiás: Soybean Crop - 2020/21

Estimate

13.7 MILLION TONS ↑ **4.3%***

4th LARGEST PRODUCER**



SHARE OF **10.1%** OF THE NATIONAL PRODUCTION

3.7 MILLION HECTARES

↑ **4.2%***

AVERAGE YIELD:
3.7 TON/HA

↑ **0.1%***

* Compared to the previous crop

** Among the states and the Federal District

Goiás: Gross Value of Soybean Production

Estimate 2021

R\$ 35.6 BILLION ↑ **26.9%***

4th HIGHEST GROSS VALUE OF PRODUCTION **



9.7% OF THE NATIONAL GROSS VALUE OF SOYBEAN PRODUCTION



54.0% OF THE GROSS VALUE OF CROP PRODUCTION IN GOIÁS

* Compared to the previous year

** Among the states and the Federal District

Goiás: Soybean Complex Exports

Year-to-date (January to May)

US\$ 2.1 BILLION

↑ **17.9%***

3rd LARGEST EXPORTER**

4.9 MILLION TONS ↓ **4.4%***

May 2021

US\$ 550.6 MILLION

↓ **7.0%***

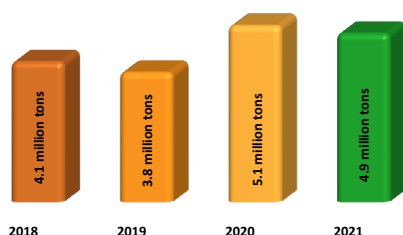
1.2 MILLION TONS ↓ **32.4%***

* Compared to the same period of the previous year

** Among the states and the Federal District

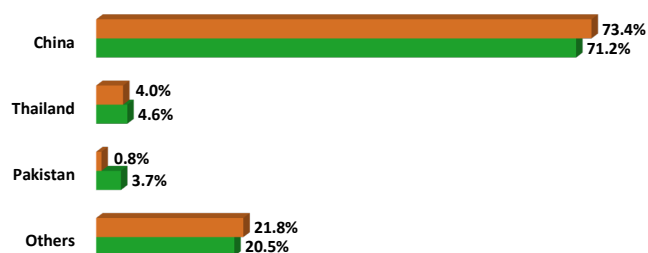
GOIÁS: SOYBEAN COMPLEX EXPORTS - YEAR-TO-DATE (JANUARY TO MAY)

YEAR-TO-DATE



Source: CONAB/MAPA/Ministry of Economy.

MAIN DESTINATIONS



■ 2020 ■ 2021

CORN



Goiás: Total Corn Crop - 2020/21

Estimate

8.9 MILLION TONS

↓ **29.2%***

3rd LARGEST PRODUCER **



SHARE OF **9.3%** OF THE NATIONAL PRODUCTION

1.8 MILLION HECTARES

↓ **3.8%***

AVERAGE YIELD:
4.9 TON/HA

↓ **26.4%***

* Compared to the previous crop

** Among the states and the Federal District

Goiás: Gross Value of Corn Production

Estimate 2021

R\$ 14.8 BILLION

↑ **24.3%***

3rd HIGHEST GROSS VALUE OF PRODUCTION **



10.8% OF THE NATIONAL GROSS VALUE OF CORN PRODUCTION



22.4% OF THE GROSS VALUE OF CROP PRODUCTION IN GOIÁS

* Compared to the previous year

** Among the states and the Federal District

Goiás: Corn Exports

Year-to-date (January to May)

US\$ 45.0 MILLION

↓ **12.4%***

5th LARGEST EXPORTER**

225.4 THOUSAND TONS ↓ **26.8%***

May 2021

US\$ 24.2 THOUSAND

↓ **79.0%***

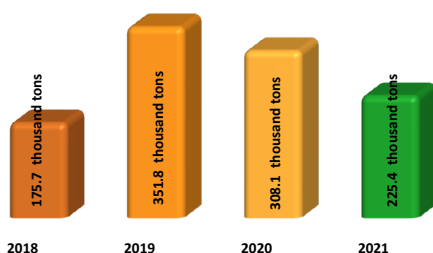
50.3 TONS ↓ **82.7%***

* Compared to the same period of the previous year

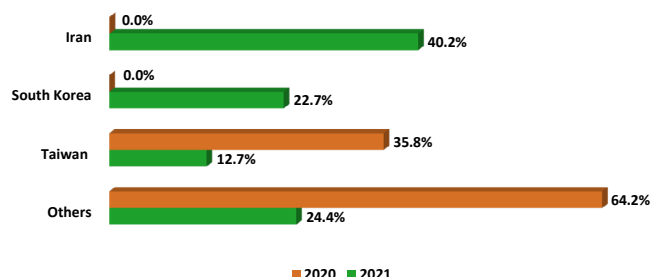
** Among the states and the Federal District

GOIÁS: CORN EXPORTS - YEAR-TO-DATE (JANUARY TO MAY)

YEAR-TO-DATE



MAIN DESTINATIONS



Source: CONAB/MAPA/Ministry of Economy.

SUNFLOWER



Goiás: Sunflower Crop - 2020/21

Estimate

42.0 THOUSAND TONS ↑ **27.7%***

THE LARGEST
PRODUCER IN THE COUNTRY**



70.1% OF THE NATIONAL PRODUCTION

20.0 THOUSAND
HECTARES ↑ **2.0%***

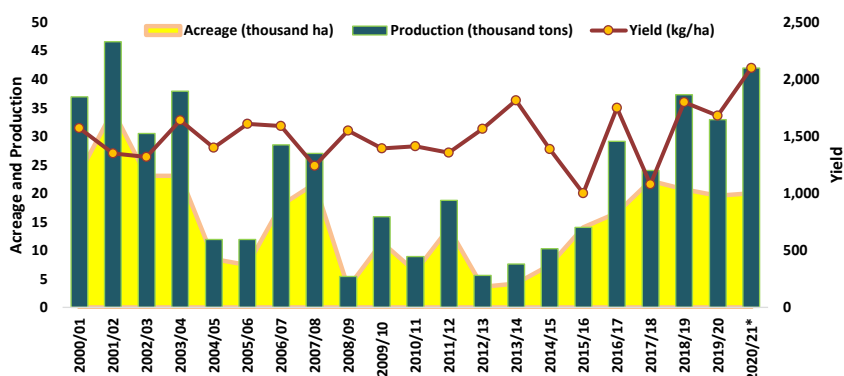
AVERAGE YIELD:
2.1 TON/HA

↑ **25.0%***

* Compared to the previous crop

** Among the states and the Federal District

Goiás: Historical Series Data of Sunflower Grain Production

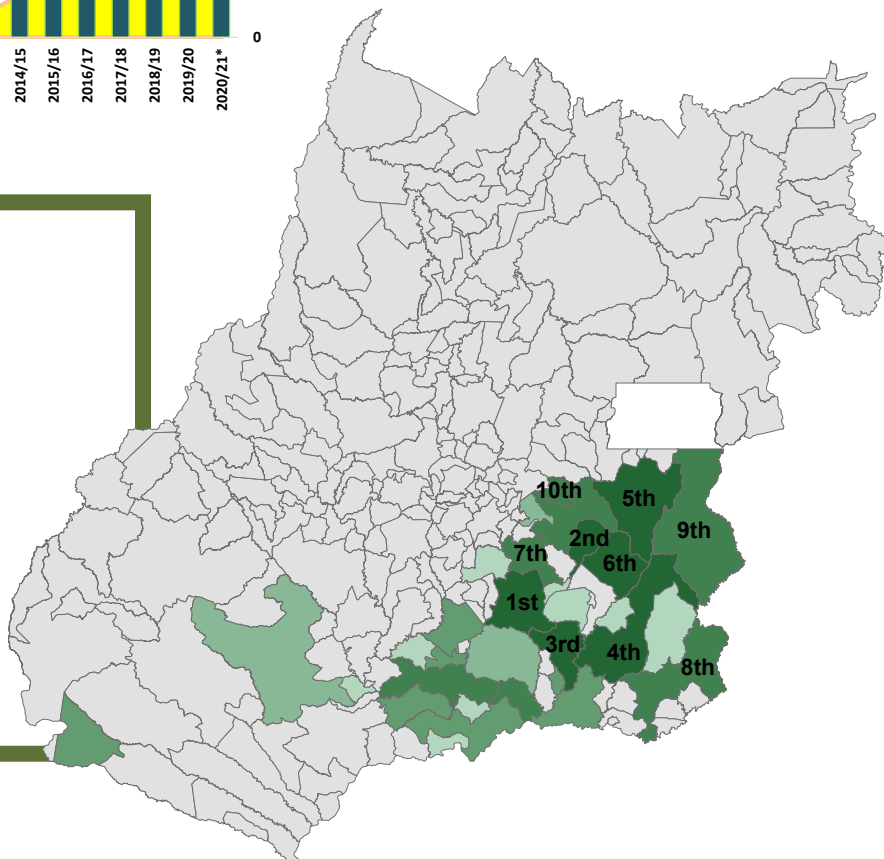


*Estimate

Top 10 producers:

Position Cities

- 1st Piracanjuba
- 2nd Vianópolis
- 3rd Caldas Novas
- 4th Ipameri
- 5th Luziânia
- 6th Orizona
- 7th Bela Vista de Goiás
- 8th Catalão
- 9th Cristalina
- 10th Gameleira de Goiás



Source: CONAB/IBGE

SUNFLOWER PROGRAM

Sunflower is a crop that has drought tolerance, low sensitivity to photoperiod and adapts to different edaphoclimatic conditions. Due to water availability, it is usually planted in the soybean succession, as a second crop.

However, there are no selective herbicides for sunflower cultivation registered in the Ministry of Agriculture - MAPA, which makes voluntary soybean plants a phytosanitary problem, since live soybean plants in sunflower crops contribute to the development of soybean rust fungus inoculum - *Phakopsora pachyrhizi*.

Thus, the Sunflower Program, through legislative measures, aims at preventing voluntary soybean plants from growing amidst the sunflower crop, during the soybean host-free period.

Main goals of the Sunflower Program:

- To set up cultural and phytosanitary inspection services in order to control voluntary soybean plants that germinate in the sunflower crop;
- Not to allow soybeans invasive plants in the sunflower crop during the soybean host-free period;
- To reduce the soybean rust fungus in the first planted soybean crops;
- To decrease diseases in the vegetative period;
- To reduce fungicide applications in management of rust fungus.

In the last two years, due to the high rainfall levels in February, soybeans had to be harvested later, causing a delay in sunflowers planting. In view of this, Agrodefesa, in response to requests made by the productive and processing of sunflower supply chain, to extend the current oilseed harvest period, evaluated the allegations and technical justifications for the claim and postponed **the crop harvest period until July 25th**.

Considering the importance and recurrence of the request, the Agency, through the Plant Health Management, will discuss these considerations, with professional associations and scientific research institutions, regarding the change of the annual schedule.

Main phytosanitary measures

● Crop registrations

Annual electronic registration of sunflower crops, through the Agrodefesa website, within 15 days after the end of planting.

● Planting schedule

The planting schedule established for the sunflower cultivation in Goiás, right after soybean crop, is until March 15th.

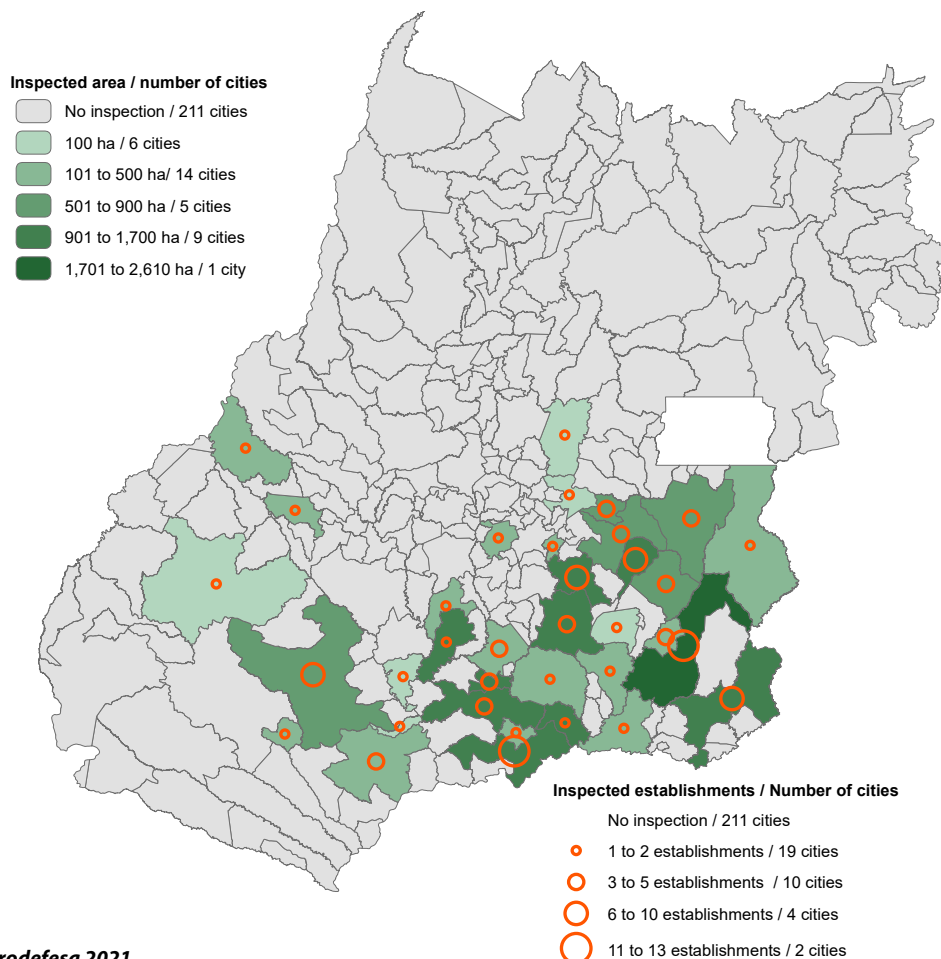
● Harvesting Date

The sunflower crops, with invasive soybean plants, should be harvested until June 30, before the host-free period begin in Goiás.

● Plant spacing

Sunflower growing, after the soybean harvest, must be seeded within 0.45 m to 0.60 m planting space. This allows for a faster cover in the sunflower crop, rapid soil shadowing, preventing invasive soybean plants to reproduce and spread.

Number of establishments and cultivated area by city



Source: Agrodefesa 2021

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